Comments on PLSR Steering Committee Report Draft Version 6

First, the report strongly feels like it was written by several different people. That’s undoubtedly necessary just to get this written. I think ideally a single final writer should work to make it feel more uniform throughout. The “measuring success” section for each recommendation feels most like it was written with different understandings of what that should be.

There was a feeling at our System meeting of directors that the recommendations were somehow meant to be sequential—that is, Recommendation 1 would be followed by Recommendation 2. I didn’t see any indication that was the case.

Pages 3-7—no major notes. On page 6, the monthly calls were not scheduled with SRLAAW, but with System Directors (resource directors not included).

Pages 8-9. I like these!

Recommendation 1—System Standards. I think there’s a lot of merit in this recommendation and probably would get a lot of support. There is confusion between mandatory and statutory standards in this section. If the mandatory standards are going to be the current statutory ones, this suggests no change from the current system. If the mandatory standards are going to be new and statutory, the recommended timeline doesn’t include the legislative process and is probably unrealistic. I think to have a draft of standards by next April is unrealistic, too. Finally, there is some sense that systems that meet Tier Two standards will have or receive performance incentives. That sounds like high-performing systems will get more money? Is that the sense?

Recommendation 2—Incentives for Change. Again, I think there would be a lot of support for this recommendation. I like the idea of a step-by-step guide. I think one part of that guide should be an evaluation system to determine if a merger makes sense, using measurable and quantifiable means. That would both help systems make informed decisions and would remove some of the emotion—both pro- and anti-merger—from the decision. I’m uneasy too with the very definitive language throughout the recommendation. The recommendation says, for instance, “System mergers or service consolidation will benefit the equitable delivery of…” I’d change the verb in those cases to “may benefit,” since it is likely in some cases that different system circumstances could make a merger more expensive and less efficient.

Recommendation 3—Reduce the Number of Systems. I was worried the Steering Team wasn’t going to be bold! Guess that was wrong. The section here on “measuring success,” bullet points 2-4, should be actions determined before a merger, and should be part of the step-by-step guide from Recommendation 2. Also, the reliance only on number of counties doesn’t reflect a lot about system complexity, and the Recommendation seems simplistic to rely only on number of counties.

Recommendation 4—Evaluate Funding Distribution. This is another solid recommendation. Three thoughts: 1) the devil is in the details here about what to include in any formula and what not to include—getting agreement on what is fair will be difficult. 2) I still don’t think it’s realistic to say that a changed formula will hold all systems financially harmless—that feels like it’s overpromising. 3) not
mentioned is a transition plan to a new formula that might make it more palatable for systems who will receive a smaller share.

Recommendation 5—Delivery pilots. It doesn’t seem accurate to call this recommendation a “pilot” when it calls for changes in delivery to most or all of the state. If it is a true pilot, is the state similar enough throughout that a pilot in one area would be conclusive evidence for other areas? That is, a pilot in Kenosha/Racine/Milwaukee counties might not have practical findings for Ashland and Vilas.

Recommendation 6—Discovery Layer. This recommendation was very clearly laid out and the technical steps identified. I’d guess Steve Ohs did it? There are a lot of soft steps that aren’t clearly identified that should be highlighted:

- Governance/decision making/rules
- Effect on delivery
- Does this assume patron-initiated ILS?
- Load sharing? Do systems need to guarantee a certain level of materials spending to be allowed to participate?
- Can systems set their own rules—opt out?
- Maybe discovery layer costs would be lower than current summed system discovery layer costs, but it’s likely some systems spend very little currently.
- Implementation—the steps after a vendor is selected—will be very long and complex, especially if there are not governance and decision making procedures put in place before hand.

Recommendation 7—Learning Management System. Honestly this one feels the “smallest” of the recommendations. However, there needs to be recognition that this process does not nearly end with the selection of software and initial configuration. This will require ongoing management by people with this role in their job descriptions—otherwise relying on system CE people to do it all could mean it quickly becomes unused.

Pages 30-31—First paragraph mentions 17 systems—should be changed.

Pages 32-33. A lonely sentence fragment is probably making library directors concerned: “Local library contributions – libraries paying into services” That should be elaborated on or removed.